

CaISAE SUCCESS PLAN

Vision: We inspire, empower and connect the best association professionals!			Recent Results					Goals for 23/24	Results for 23/24 (@5.17.24)	Goals for 24/25	Mission: Advancing the association profession through knowledge, valued relationships and trusted resources.
Objectives	Measures	Volunteer Group(s) Responsible	FY19	FY20	FY21	FY22	FY23*	FY24	FY24	FY25	FY 25 Strategies
1. Build a welcoming community among members with a culture and environment that inspires collaboration and produces valued relationships.	Total Association Professional Members	MAG, Regional Councils	969	985	866	1,050	991 (shift to Novi changed reporting to "real-time")	1,006	1,045* (est.)	1,064	<ul style="list-style-type: none"> Establish a value proposition and list of member-only benefits. Communicate these out to membership on a regular basis to reinforce the value of CaISAE. Re-evaluate on a yearly basis. Create robust outreach plans for these groups (non-members, lapsed members, Nevada)
	Total Industry Partner Members	MAG, Regional Councils	499	464	236	311	338 (shift to Novi changed reporting to "real-time")	343	400* (est.)	417	<ul style="list-style-type: none"> Create an engagement plan for segments we want to grow (Oregon, Nevada, New Members, Young Professionals) i.e.: MAXIMIZE, First timer meet & greets, email drip campaign
	Volunteer Satisfaction: Net Promoter Score (NPS = promoters less detractors)	Leadership Development Committee	64%	n/a (covid interrupted)	61%	82%	76%	65%	84%*	70%	<ul style="list-style-type: none"> Maintain an organized volunteer program including clear expectations, onboarding, structure, and evaluation. Recruit new volunteers each year to help engage members and diversify the pool of volunteers. Implement recognition component as part of end-of-the-year activities for council & committee leadership. Ensure committees and councils complete volunteer plans with goals and strategies related to the success plan through mid-year and end-of-year reporting.
	Member Satisfaction: CaISAE's Practice of DEI	DEI Committee/ Board/All		18%			50%	65% (2025)	N/A (measure in 2025)	65%	<ul style="list-style-type: none"> Increase Member Knowledge/Awareness of CaISAE's DEI initiatives through our communications and programming. The DEI committee will review and recommend revisions to the Award & Scholarship Applications & Criteria, Volunteer Plan, Leadership Development Plan, and Board application process & criteria. Staff will launch a campaign to collect demographic data on the membership application & volunteer applications. DEI topics will be included in CaISAE signature and specialty events

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2. Create opportunities for members to exchange knowledge and resources.	Seasonal - Association Professional Attendance	Seasonal	417	435	335	372	436	381	502*	437 (registered tradeshow attendees)	<ul style="list-style-type: none"> • Implement marketing strategies to incentivize early registration, show value for staff or all levels and attract first-time as well as returning attendees. • Provide education programs of the highest quality to increase AP attendance across different experience levels. • Design an engaging on site experience for attendees to network and learn.
	Seasonal - Exhibitor Satisfaction	Seasonal	4.32	4.45	3.63	4.4	4.31	4.2	4.46*	4.2	<ul style="list-style-type: none"> • Communicate the value in exhibitor marketing (# of first time attendees expected, what's new/different, sponsor exposure, etc.). • Improve value for exhibitors by increasing AP attendance and limiting exhibition opportunities (increasing the attendee-to-exhibitor ratio). • Ensure there is a variety of different and first-time attendees each year (benchmark of 27% different from the previous year). • Ensure EXCHANGE participants exceed the number of exhibitors to provide optimum matching opportunities. • Provide substantive sponsorship opportunities that provide additional valued exposure at various price points.

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3. Build a learning community that is responsive to the changing dynamics of the association and not-for-profit management professions.	ELEVATE - Association Professional Attendance	ELEVATE	137	n/a (covid cancelled)	143	109	158	150	172	150	<ul style="list-style-type: none"> Implement marketing strategies to incentivize early registration, show value for staff or all levels and attract first-time as well as returning attendees. Analyze attendance trends to understand attendance patterns and potential for market expansion. Design an engaging on site experience for attendees to network and learn.
	ELEVATE - Association Professional Satisfaction	ELEVATE	4.49	n/a (covid cancelled)	3.82 (virtual)	4.37	4.25	4.2	4.29	4.2	<p><u>Content Strategies:</u></p> <ul style="list-style-type: none"> Experiment with different education session formats and delivery methods. Continue the peer review model so that education is driven by the CaISAE community. <p><u>Experience Strategies:</u></p> <ul style="list-style-type: none"> Seek out venues and supportive CVBs that are fully committed to the partnership with CaISAE and the host community in order to provide engaging, exciting, and unique experiences that promote the destination. Work with the ELEVATE Committee to craft and implement member-centric experiences and activities before, during, and after the event.

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4. Run CaISAE as an effective model business.	Seasonal Net Profit	Seasonal	265k	310k	97k	193k	284k	307k	331k* (actual)	\$324,623	<ul style="list-style-type: none"> Expand the tradeshow floor to the ideal level; sell out the show & EXCHANGE and improve overall value. Ensure booth and EXCHANGE fees are commensurate with the market. Selectively provide a limited number of comp booths for high value exchange of in kind services. Invest wisely in the production of education content.
	ELEVATE Net Profit	ELEVATE	139k	n/a (covid cancelled)	81k	90k	161k	142k	169k* (est.)	\$139,823	<ul style="list-style-type: none"> Continue to partner with host venues and host CVBs that offer competitive pricing in order to keep expenses reasonable and affordable to both CaISAE and attendees. Design and implement a pricing strategy to ensure alignment of registration fees with market value while keeping within an acceptable threshold for members.
	CaISAE Budget Net Profit	All	65k	-21k	+9k	-9k	+11k	-12k	+84k (est.)	31k	<ul style="list-style-type: none"> Four of the ten metrics in the strategic plan account for 80% of CaISAE's revenue (and profit): Seasonal Spectacular net profit, ELEVATE net profit and total membership of IPs and APs. Optimize current marketing programs and online products and continue to evaluate new opportunities. Ensure a strong process is in place to provide timely reports on the budget and finances.
								* All-time highs for CaISAE			